



PLANNING FOR THE NEXT 100 DAYS:

Navigating The Challenges Presented By COVID-19

CCS is a strategic fundraising firm. We partner with nonprofits for transformational change.

Association of Development Officers
May 13, 2020 | 1 to 2 PM EST | via Zoom



Today's Presenters



Carl P. Cervi
Corporate Vice President
CCS Fundraising



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About CCS

For more than seven decades, CCS has partnered with nonprofits to deliver meaningful and measurable change, advancing many of the most important causes in history.

CCS is proud to have partnered with leading regional organizations:



TOPICS FOR DISCUSSION



Observations
Since the Crisis Began



Stages of Post-COVID
Fundraising Evolution



Considerations
For Fundraising in the
New Environment

1 OBSERVATIONS SINCE THE CRISIS BEGAN



CCS COVID-19 GUIDELINES



INCREASE COMMUNICATION
to Show Empathy
and Provide
Impactful Updates



INCREASE ACTIVITY
and Consider Special
Fundraising
Initiatives



AVOID WHOLESALE CANCELLATION
of Fundraising Plans



DEVELOP ACTION PLANS
for the Short-Term
and Re-Emergence



REAFFIRM YOUR MISSION AND IMPACT
to Cement
Relationships with
Donors and Friends

ENCOURAGING PHILANTHROPIC RESPONSE

 **\$10 BILLION**
(and growing!)

Corporate
Response

Individual
Philanthropists

Foundation
Response

New Collaborative
Initiatives

WHAT STANDS OUT

Donors are funding programs and areas not previously declared as high priorities

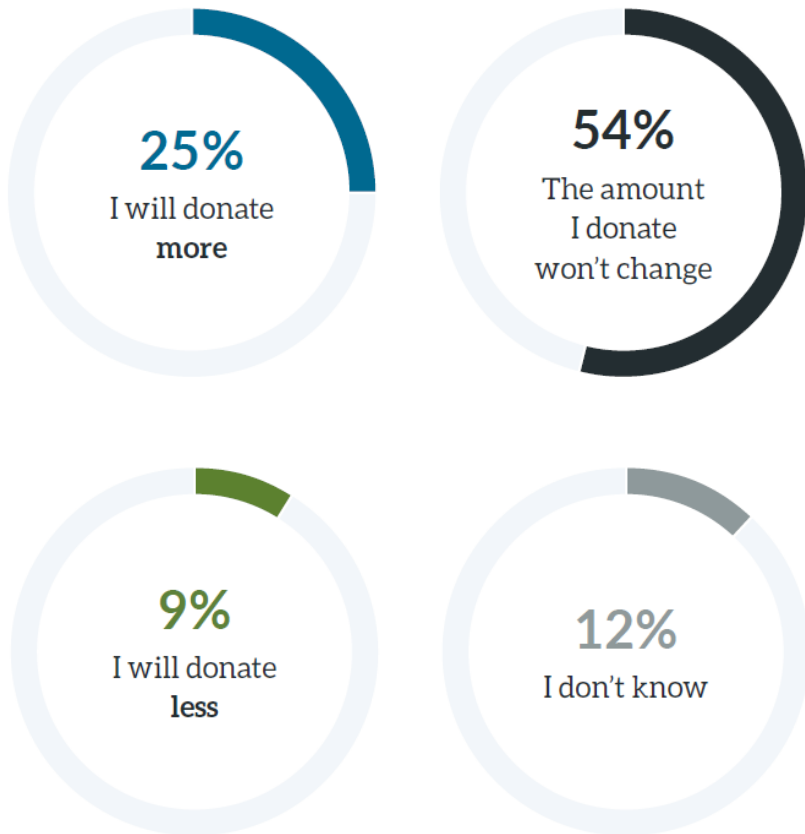
Philanthropists are providing:

- Food for hospital workers
- PPE
- Support for nonprofit employees
- Support for the initiatives of their beloved organizations responding in their own way to the crisis

CURRENT DONOR SENTIMENT:

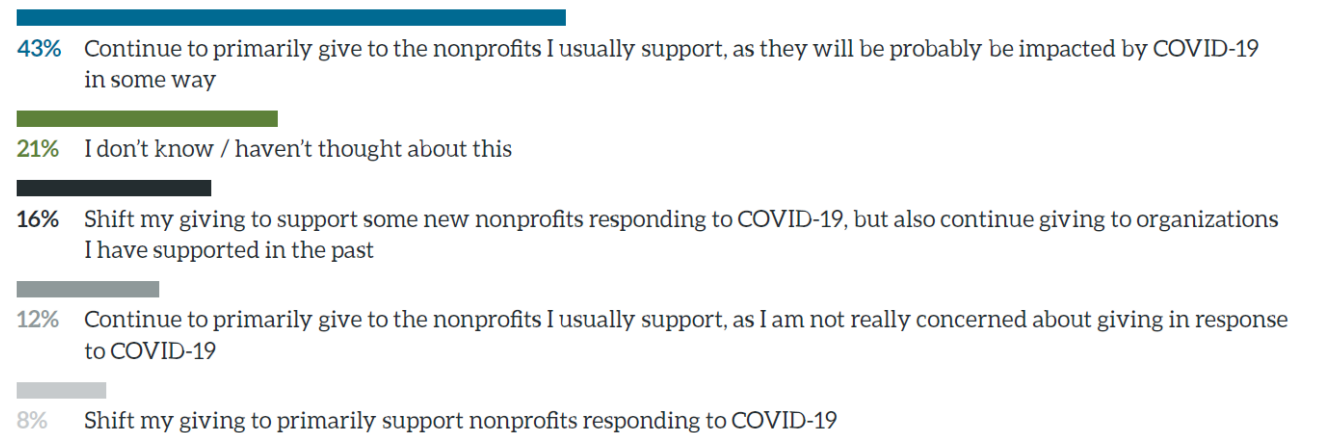
GIVING BEHAVIORS AMID COVID-19

In 2020, what do you anticipate will happen to the amount you usually donate to nonprofit organizations as a result of COVID-19?



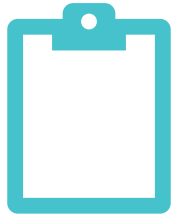
Thinking of COVID-19, which of the following best describes how you plan to support nonprofit organizations this year?

This year I plan to...



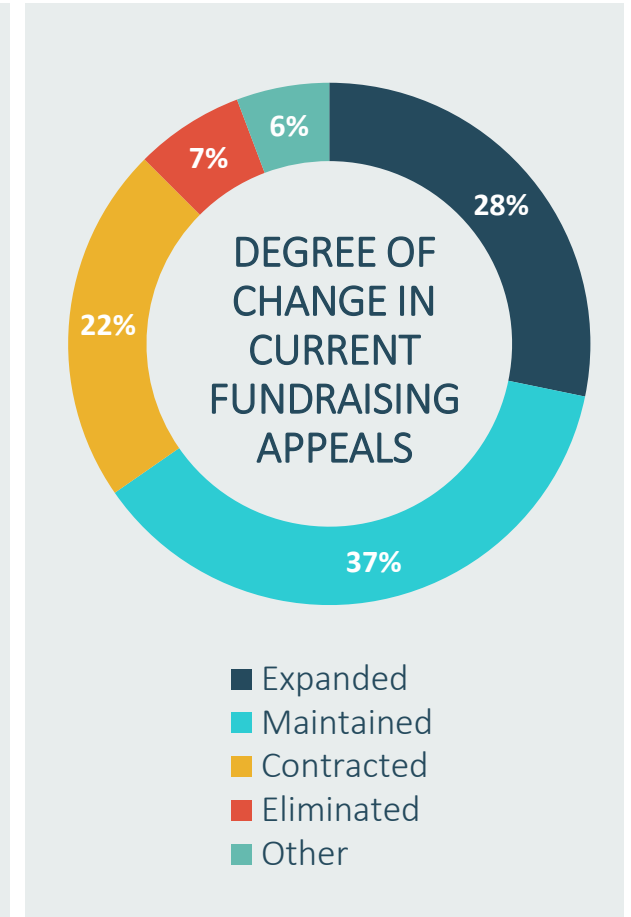
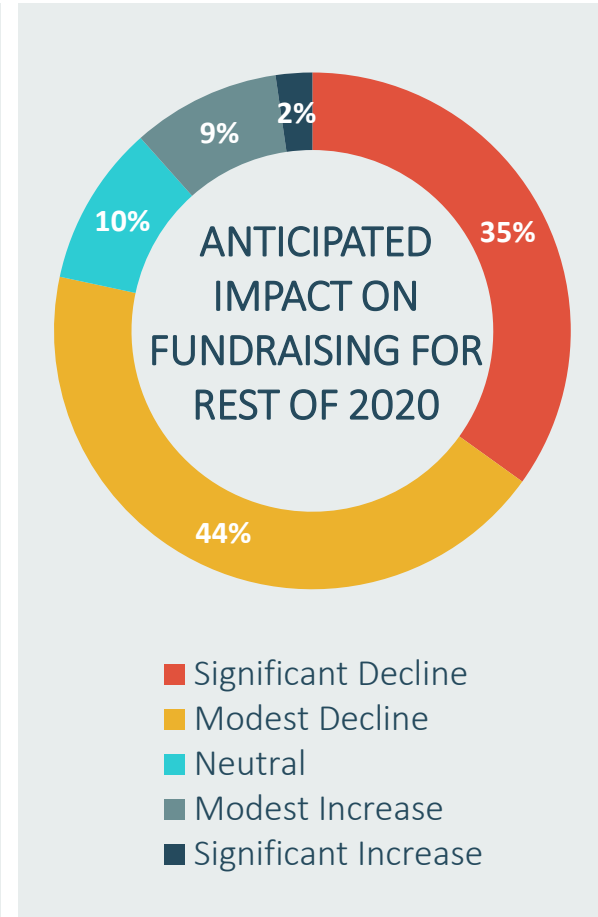
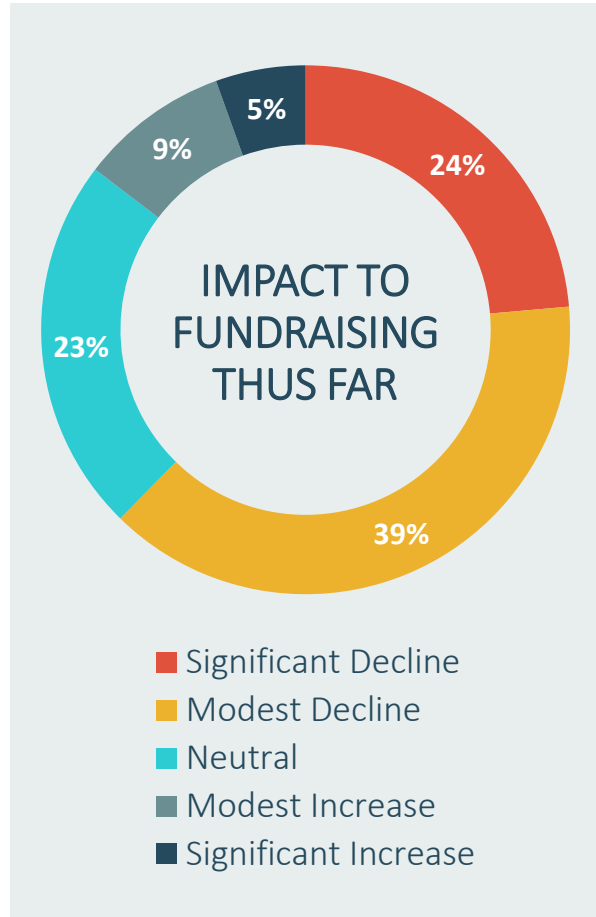
CURRENT NONPROFIT SENTIMENT:

ANTICIPATED DECLINES AND EXPANDED APPEALS



In late-April, CCS distributed a **Philanthropic Climate Survey**.

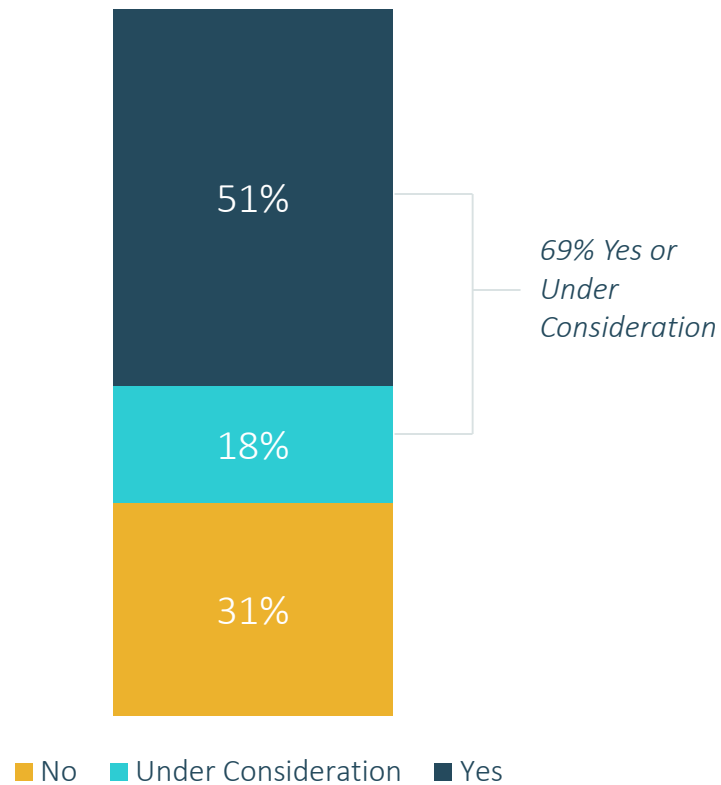
Responses shared are from nearly **1,200 participants**.



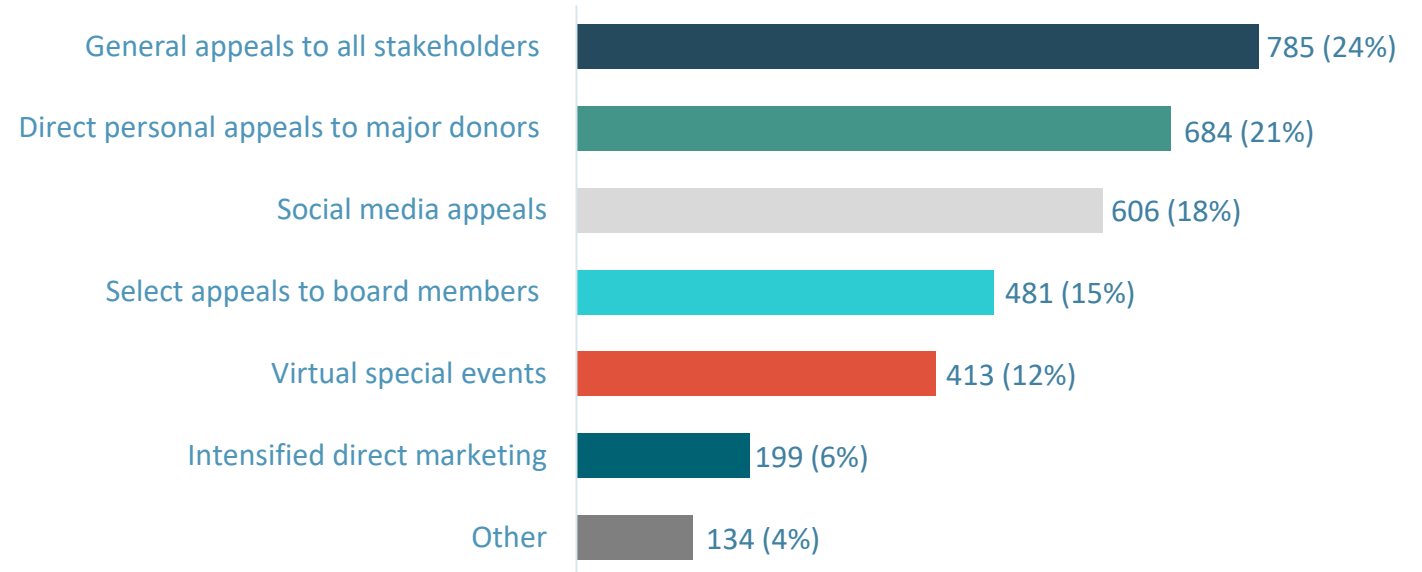
CURRENT NONPROFIT SENTIMENT:

WIDESPREAD SPECIAL FUNDRAISING APPEALS

SPECIAL APPEALS / EMERGENCY FUNDS

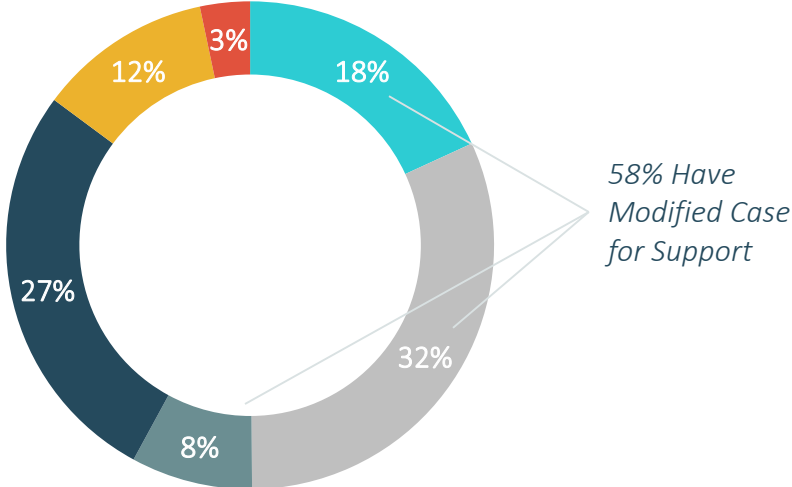


PRIORITIZED FUNDRAISING STRATEGIES



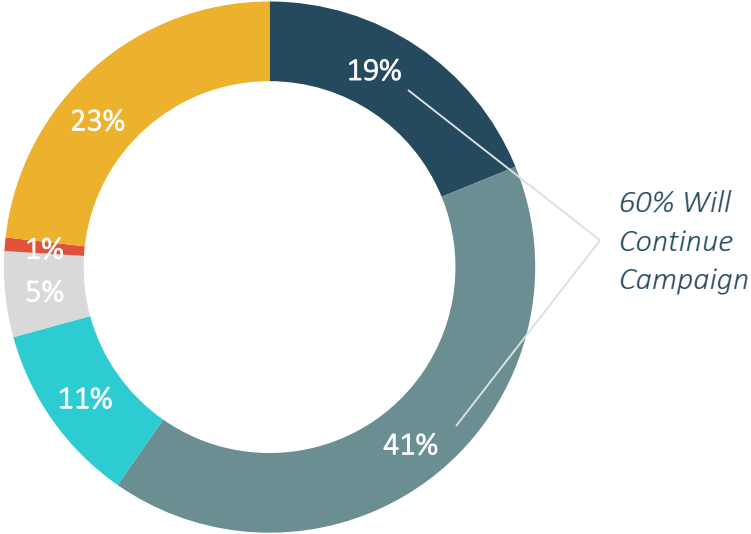
**CURRENT NONPROFIT SENTIMENT:
MODIFIED CASES FOR SUPPORT
AND CONTINUED CAMPAIGNS**

CHANGES TO CASE FOR SUPPORT



- Yes, with special expanded focus on current programs
- Yes, with special focus on new programs responding to COVID-19
- Yes, with special focus on staff support
- No, our case and needs are the same
- Our case and priorities are currently under review
- Other

CHANGES TO MAJOR CAPITAL OR COMPREHENSIVE CAMPAIGNS

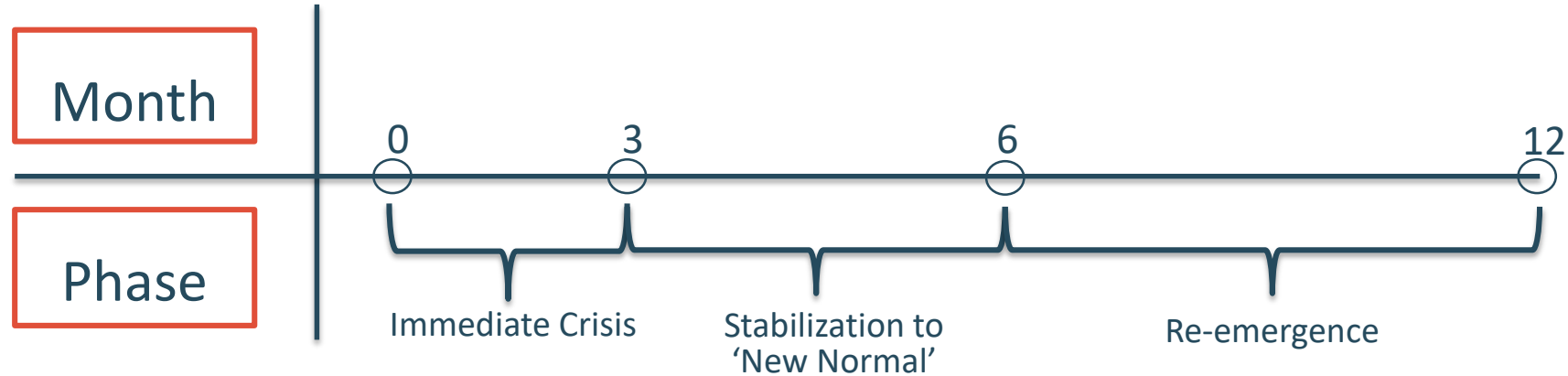


- Continue as planned
- Continue with modifications (e.g. extend timetable, adjust goal, modify case)
- Postpone campaign
- Postpone launch
- Cancel campaign
- Under review

2 STAGES OF POST-COVID FUNDRAISING EVOLUTION



Responding, Calibrating, Rebuilding



I. IMMEDIATE CRISIS

CHARACTERISTICS:

- Chaotic
- Urgent
- Fast-moving while immobile

AREAS OF FOCUS:

- Continued Operations
- Special Appeals

II. STABILIZATION

CHARACTERISTICS:

- Methodical and slowing
- Planful

AREAS OF FOCUS:

- Program modifications
- Stakeholder engagement

III. RE-EMERGENCE

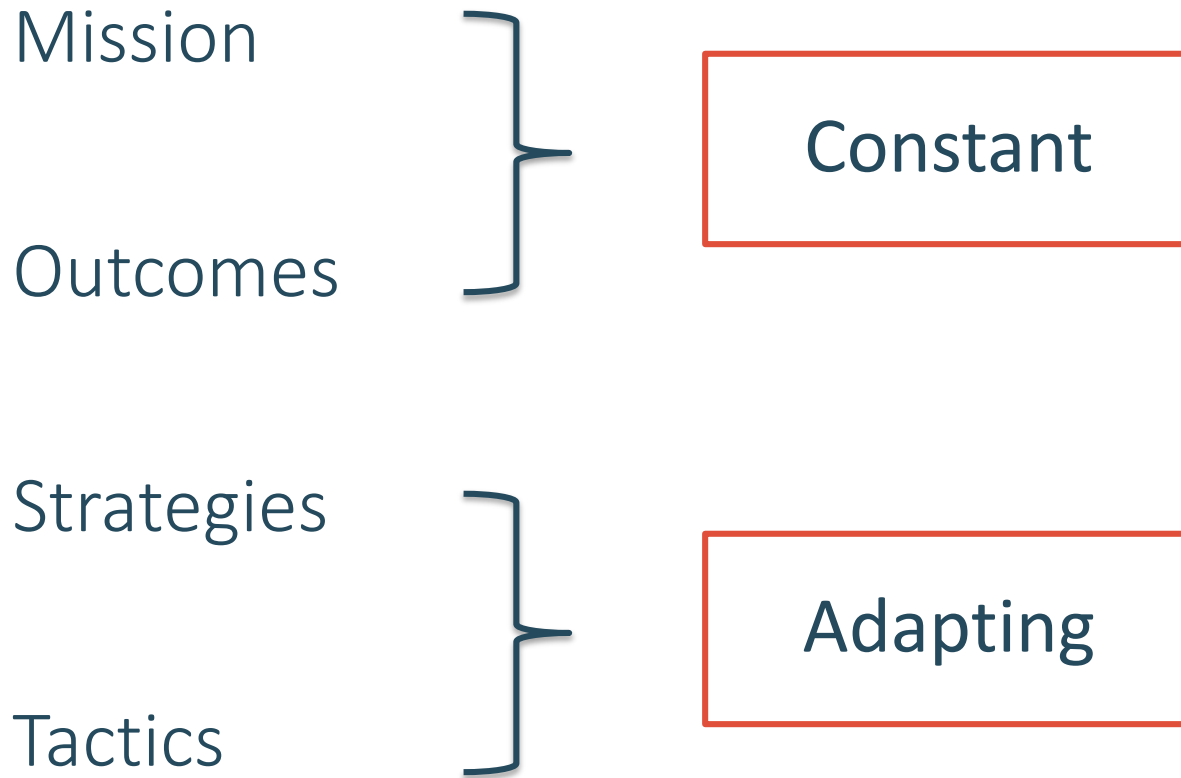
CHARACTERISTICS:

- Resembling pre-COVID

AREAS OF FOCUS:

- Campaigns and fundraising plans
- Metrics and evaluation

Decision Making Framework



What We Can Do

Gut Check Locus of Control

- No way to know how long this will last or what will happen in the economy
- Focus on “knowns” and what can be controlled
- Are direct reports focusing in the right areas/on the right things?

Identify Problems

- There’s “water leaking in” from a lot of points right now
- Monetary Resources? Time/Bandwidth? Relevance/Attention?

Prioritize and Pare Down

- Where can you let go of small leaks to focus on big holes that merit your brain power?
- What does this mean for short-term strategies and tactics?
- How does this have a through line to the longer term?
- What should we be doing right now to set us up for a better place in the future?

STEP 1:

Assess

How have you modified your services and what is the status of your fundraising?



STEP 2:

Adjust/Pivot

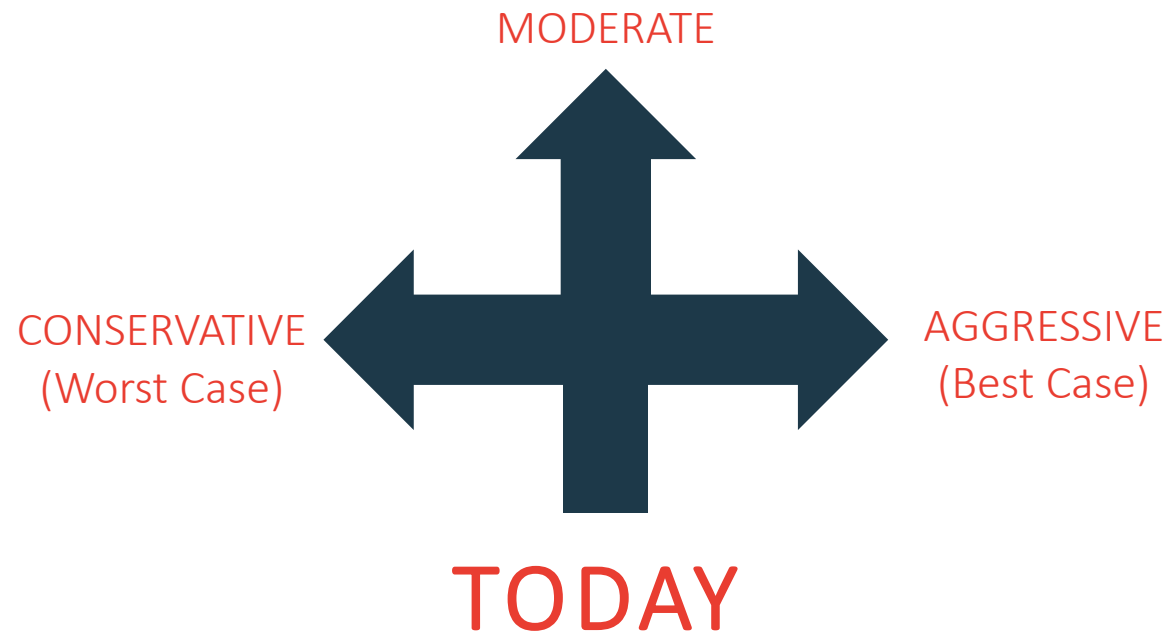
How do effectively adjust or pivot your fundraising during these times?

3 CONSIDERATIONS FOR FUNDRAISING IN THE NEW ENVIRONMENT



RE-EMERGENCE SCENARIOS

The speed with which society emerges from this crisis will be impacted by continued community-wide actions



KEY CONSIDERATIONS

- Some of the most Aggressive models predict a **beginning of re-emergence during Q2 of 2020**
- More Conservative models suggest that **real re-emergence will not happen until Q2 of 2021**
- Your own organization will have to **consider sector-specific and region-specific elements** to craft your own scenario plans

SCENARIO PLANNING

HOW TO EVALUATE: “WHAT IF...”



Gather key decision makers, including a trusted Board member or two



Identify critical streams of philanthropic revenue over the next 6-9 months (e.g., major gifts, grants, fall events, fall appeals)

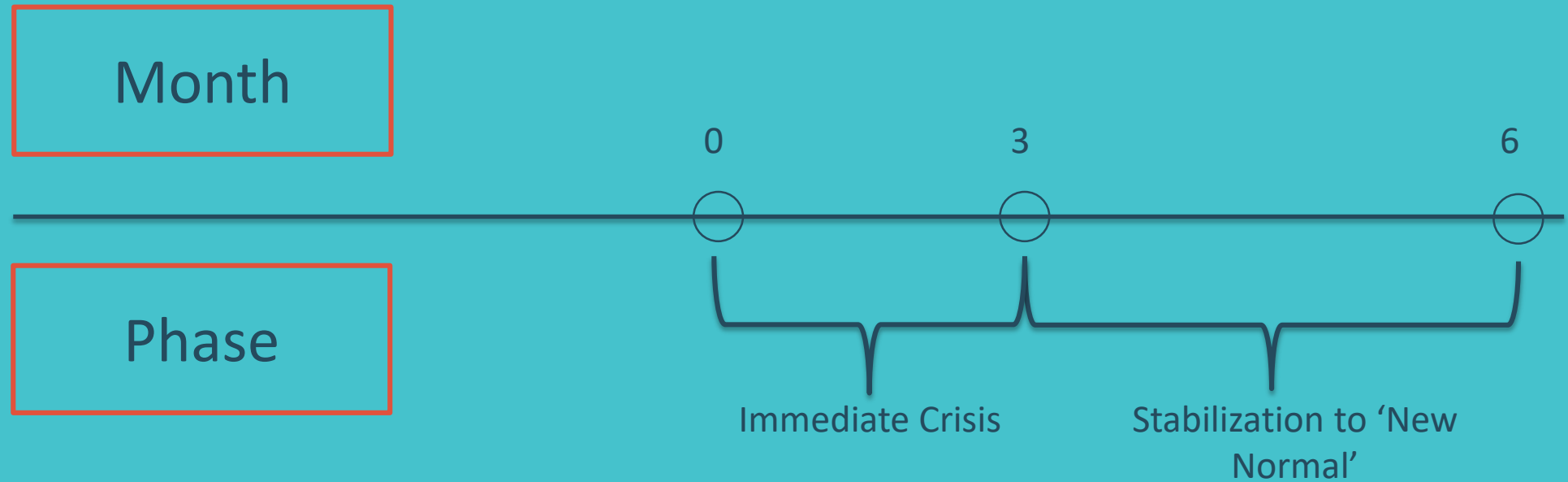


Identify a best case, worst case, and middle ground scenario that applies to your sector, region, and organizational dynamics



Assign primary decision-makers for each revenue stream

Short Term Focus



Stages of Fundraising Evolution

	I. IMMEDIATE CRISIS	II. STABILIZATION	III. RE-EMERGENCE
CASE FOR SUPPORT	<ul style="list-style-type: none"> Immediate Action Urgent funding requirements 	<ul style="list-style-type: none"> Interim funding plan and Case for Support Short-term funding impact and benefit 	<ul style="list-style-type: none"> Establish modified or new strategic priorities Draft Case for Support for the foreseeable future
STAFF LEADERSHIP AND BOARD	<ul style="list-style-type: none"> Special emergency working group Stakeholder outreach 	<ul style="list-style-type: none"> Assess crisis impact and recast short-term priorities Broaden role in fundraising 	<ul style="list-style-type: none"> Reconstitute Development Committee Reorganize fundraising leadership structure to support plan
PROSPECTS	<ul style="list-style-type: none"> Segment by giving level and relationships Determine the prospects most viable for immediate requests 	<ul style="list-style-type: none"> Reprioritize prospect pool Establish individual plans 	<ul style="list-style-type: none"> Full donor base review Screen, model, prioritize
PLAN	<ul style="list-style-type: none"> Intensify communication: connect, inform, and thank Implement special appeals to select donors and all audiences 	<ul style="list-style-type: none"> Survey donors Design strategies for each donor segment Offer short term gift payment options 	<ul style="list-style-type: none"> Rebuild capacity to support future efforts Reassess goal, timing & Case elements of major campaign

Develop an Action Plan – Then Execute

The depth and breadth of opportunities can feel overwhelming. Focus your efforts by creating a **specific, goal-oriented action plan.**

1.

Identify Need and Keep Your Mission in Mind

Identify your funding needs and how they will impact your organization today, next quarter, or next year. Identify aligned opportunities.

2.

Start Documenting the Financial Impact

How has this crisis impacted your budget, staffing, and mission? Track changing outcomes and, when possible, support the field by participating in information-gathering questionnaires and surveys.

3.

Allocate Staff and Time

Like any funding endeavor, this process will take time, strategy, and manpower - and urgency is key. Organize and activate staff, Board members, and volunteer leaders to lead the charge.

4.

Craft Your Case

Tell the story of your organization and its needs through the lens of today. How are you changing lives now? How will you change lives in the future? Prepare grant proposals.

5.

Execute the Plan




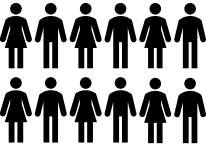
Submit proposals and follow up. Keep in mind this is an ever-changing environment. Start the conversation, be responsive, and keep an eye on new opportunities.

Communicate Frequently

- **Month 1**
 - Segment donor file
 - Private conversations requesting commitments from key leadership
 - Establish and announce emergency fund
 - Draft initial communications
 - Update web pages
 - Tier 1 appeal

- **Month 2**
 - Special fund update
 - Tier 2,3,4 appeals
 - Personal phone and emails to top stakeholders
 - Thank and acknowledge donors
 - Update web pages

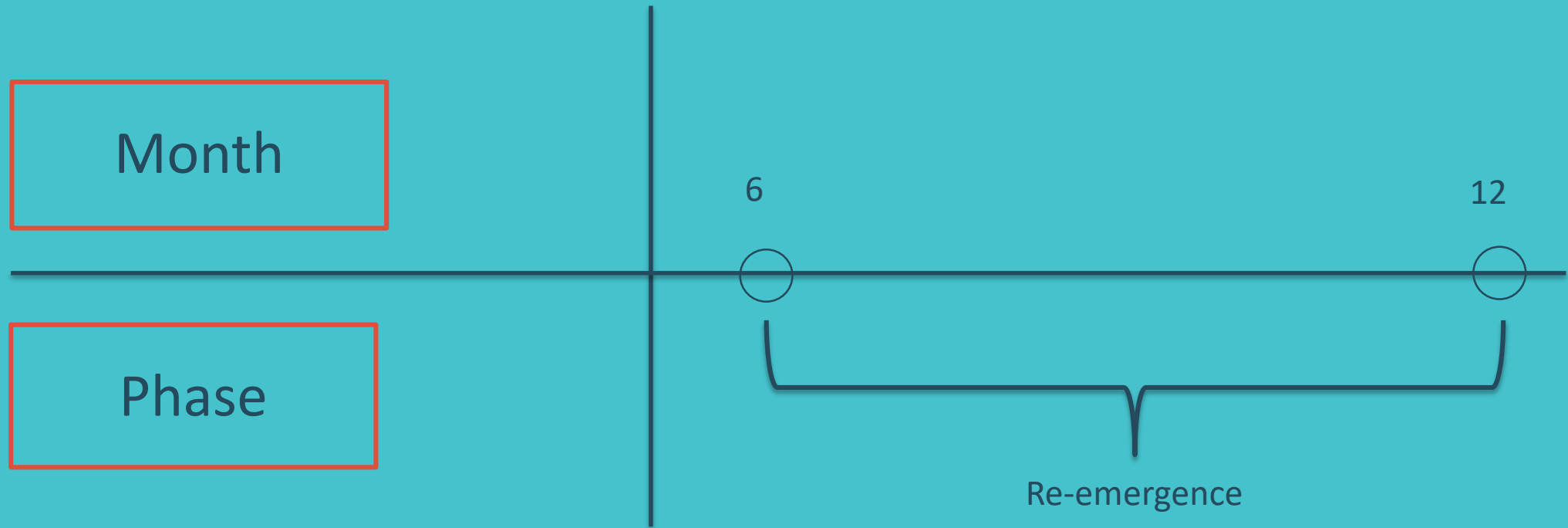
- **Month 3**
 - Fund updates and special announcements
 - Follow-up communication to 2,3,4 tier appeals
 - Continue personal phone calls and emails to top stakeholders
 - Update web pages

Tier 1 	Board members and largest donors	Personal phone calls
Tier 2 	Close friends and other major donors	Highly personal emails
Tier 3 	All other donors	Slightly personal emails
Tier 4 	Everyone else in the donor file	General emails

Engage Scenario Planning

Example Scenario Planning	Best Case	Worst Case	Somewhere in Between
October Gala	Social distancing requirements are eased and people are comfortable gathering in groups by the time October 17 th arrives.	Full social distancing requirements are still in place and we did not pivot quickly enough to a revenue replacement plan.	We facilitated conversations this summer with major sponsors as the situation evolved and had a clear picture of revenue impacts by September 1.
Major Gifts Program	Virtual visits keep most prospect plans on track through Q3, and travel and social distancing requirements are eased in time for the year-end push.	We don't see or have an opportunity to solicit our top donors until January 2021.	Some of our significant donors are impacted by the public health crisis or economic challenges, but we have enough information to reframe our plans.

Long Term Focus



Stages of Fundraising Evolution

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Preparing for Better Days

- Where can individualized gift request strategies be accelerated?
- Consider doubling-down on gift planning activities
- Evaluate Strengths, Weaknesses, Opportunities, Threats
- Determine if Board is properly involved in development
- Follow-up on short-term activities for long-term results





Q&A

THANK YOU!

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For more resources on the impact of COVID-19 on philanthropy, please visit: <https://ccsfundraising.com/strategies-during-covid-19/>

Recent posts include:

- [5 Essential Strategies for #GivingTuesdayNow Follow-up](#)
- [The Keys to Maximizing Your Virtual Gala](#)
- [Continuing a Nonprofit Fundraising Campaign in Uncertain Times](#)

To learn more about CCS Fundraising, please visit us at: <https://ccsfundraising.com/>



APPENDIX

REFLECTING ON THE PURPOSE OF YOUR FUNDRAISING EVENT

①
Is it strictly a
transactional
event?

③
How does donor
recognition fit into
your event plan?

⑤
Can you go
without it?

②
Designed to convene
new and emerging
donors for future
cultivation?

④
What is the
inspiring
mission
moment?

MAXIMIZING A VIRTUAL FUNDRAISING EVENT

01

Engage your leadership team and top donors.

- Deploy your team to personally call your most supportive leaders and donors.
- Share your plans, seek advice, and ask for early commitments.

02

Increase communications to your greater community.

- Ensure your community is aware of your organization's needs, the impact COVID-19 is having on your programs and services, and ways to help.
- As your virtual event takes shape, you can communicate plans and ask for support from an already captive audience.

03

Consider what makes your in-person event unique and adapt to an online format.

- Are there awards and recognition opportunities that inspire and motivate others?
- Are there annual performances or entertainers willing to help?
- Integrate the elements that make your fundraising event special into your online program.

Ask for Money and Advance Donor Relationships

- Contact event sponsors and donors, ask for gifts now and share your plans
- Send emergency appeals and follow up on them, but don't overlook high ROI opportunities
- Look at all donors from highest giving to lowest
 - Who hasn't given yet this year? – ask for their gift now
 - Who has given, but we think could give again or more?
 - Top-down, inside-out
- Know your needs, tell the story: now, next, long-term
- Reach out to foundations and ask if there are COVID-19 response funds available. Share your response, and pressure test the grant proposal
- Contact corporate partners, be candid about your needs, be empathetic to impacts to their business, engage employees if you can
- Are you unsure? Listen and ask to ask!

Activate Your Board

- Ask them for help!
- Leverage social media channels to raise awareness (link to social media channels and sample messaging)
- Make an additional gift or secure a challenge grant
- Motivate their company to make a gift
- Direct those in their sphere of influence to make a gift
- Host crowdfunding event to share your passion for the work we are doing (link to crowdfunding platform)
- Volunteer to fill or support fundraising roles, especially if the fundraising team has limited capacity
- Help us thank our donors to encourage and increase future support
- Recognize board and staff contributions

BOARD ACTIVATION SAMPLE SCRIPT

As a board member, you can play a vital role in ensuring we raise the funds needed to deliver our mission by leveraging relationships within your sphere of influence. We ask that you consider engaging in at least one way to help raise funds and/or awareness of our work.

Here is how you can help:

1. **Your Networks:** ask for support from your contacts through email (see suggested templates below) or through social media.
2. **Your Annual Gift:** if you have been thinking about making your gift to, please consider accelerating that and make your gift now.
3. **Your Companies:** If your companies are able to make emergency disaster grants, please consider advocating for us.
4. **Additional Gifts:** if you have already given and are in a position to increase or make an additional donation, our urgency and need for funds is most real. You can donate online.

Update Your Thank You Letter and Phone Script

THANK YOU LETTER LANGUAGE

- Thank you so much for your gift to xxxxxxx. You are helping us [IMPACT] for the many neighbors experiencing health and economic hardships caused by the COVID-19 outbreak.
- Your gift is helping to fuel ORGANIZATION's emergency response in this moment by:
 - Example
 - Example
 - Example
- We will continue to keep you updated on the latest developments around our response efforts. To stay abreast of additional ways you can help, please follow our social media channels and check our website for updates.
- In unexpected times like these, we are so grateful for your partnership—thank you!

THANK YOU CALL SCRIPT

- Hi, [Donor Name]! This is [Your Name], a [Your Role] at [Organization].
- I'm calling to say thank you for your generous gift to our COVID-19 relief efforts. Because of your support, we are able to adapt our business model and work to meet the growing needs in our communities. As you know, the situation is rapidly evolving, and our team here is working around the clock to ensure our neighbors have what they need. (insert any Covid-19 measures you are doing).
- Thank you for making this possible. I also wanted to check in on you and your family. How are you faring through this time?
- Please know we are thinking of you. We would love to keep you updated on the work you are making possible. We will be sending out (weekly impact reports), can I confirm your best email so that we can share those with you?
- Again, thank you for your support. It has been my pleasure to speak with you.